

How NRCS Will Do Business



Natural Resources Conservation Service

Conservation Planning Course

Module 1 How NRCS Will Do Business

Objectives

At the end of this module, the participant will be able to:

1. Describe the purpose of this course.
2. Describe their expectations for the course.
3. Describe the importance of the conservation partnership.
4. List the five principles for an effective conservation planner described by Hugh Hammond Bennett.
5. Discuss the relationship between “providing technical assistance” and “conservation planning.”
6. Define the achievements of conservation planning.
7. Explain why conservation planning should be done in the field with the decisionmaker.
8. Describe the historical development and the philosophical basis for a voluntary conservation program delivered through the conservation partnership.



Conservation Planning

Module 1 - Objectives

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Conservation Planning

Module 1 - Objectives cont.

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6. Define the achievements of conservation planning.
7. Explain why conservation planning should be done in the field with the decisionmaker.
8. Describe the historical development and the philosophical basis for a voluntary conservation program delivered through the conservation partnership.

References:

General Manual (450-GM, Part 401),
General Manual (180-GM, Part 409)
Field Office Technical Guide (FOTG)
National Planning Procedures Handbook (NPPH)
Mutual Agreement between USDA and the Conservation Districts

Training Aids

Pre-Test, 2-3 Flip Charts, Participant Notebook

Method of Instruction

Pre-course Readings, Presentations and Discussions

Pre-Course Reading

Executive Summary of the Course

Course Overview

How NRCS Will Do Business

Total Time

3 Hours

Module 1—Table of Contents
How NRCS Will do Business

Welcome and Introductions	1.4
State Conservationist's Comments	1.7
Welcome—How We Will do Business	1.7
Why the Course is Important	1.9
Instructors	1.10
State Partnership	1.10
Thank the Landowners	1.11
Expectations	1.11
Summary	1.12
Introductions	1.13
Overview of the Course	1.17
Part 1—Background and Framework	1.19
Part 2—Hands on Application	1.20
Part 3—The Coaching Arrangement and Conservation Planning Assignments	1.22
Pre-Course Test	1.25
Pre-Course Reading	

Welcome and Introductions

Instructor Note

Following is an example of an opening statement for the course. You are encouraged to develop your own statement or adjust this one to fit your particular needs.

Welcome to the Conservation Planning Course. It is a pleasure to have each of you here as participants in this important course. It is also a pleasure for me to be here as one of the instructors.

All of you know, from the pre-course reading, that conservation planning is the foundation of the services that we provide to our clients across (state) and across the nation. It is the very essence of our work in that conservation planning is how we transfer our knowledge to clients, how we help clients develop, implement, and evaluate resource management systems, and how we learn from clients.

We will do introductions a little later, but allow me to share with you some general information on who is here and why. First, participants in this course are representative of the conservation partnership in (state) . Together we plan our work. Together we do the work. We are all here to share our knowledge, to learn more about the conservation planning process, and to prepare ourselves to more effectively meet the challenges of the future.

Some of you have become part of the conservation partnership during the latter half of the 1980s and the first half of the 1990s. During this time a lot of our attention was directed toward conservation compliance issues—mandates created in the 1985 Farm Bill (Food Security Act, as amended). You are to be congratulated for the wonderful work you did during this period of time.

During this time frame the conservation partnership positively changed the resource face of America! Unfortunately, the workload created by conservation compliance activities did not leave much time to do comprehensive conservation planning, the kind of planning that will be taught in this course as how the conservation partnership should do business.

Another group represented here was involved in the conservation partnership and did conservation planning prior to the 1985 Farm Bill or have been in positions during the time frame of carrying out the provisions of the 1985 Farm Bill that allowed them to do comprehensive conservation planning. These are the people we have called on to serve as instructors, group leaders, and coaches. The instructors' roles should be obvious—providing information as I am now, leading discussions, and directing learning exercises in the classroom and in the field. Staff serving as instructors are knowledgeable in the subject matter they will teach and in how the subject fits into the conservation planning process.

You will be working in small groups in the field exercises. A group leader has been assigned to help guide and facilitate the work of each group. These individuals are also experienced conservation planners. Among other duties, the group leader will work to ensure that all of us are actively involved in the work.

Coaches are a special kind of instructor. The members of the partnership serving as coaches are some of our most experienced conservation planners. They are knowledgeable and proficient in the planning process and the technical subjects that apply to the most common resource problems and opportunities faced by our clients. They know how to find answers when new problems and opportunities arise. The coaches will teach through one-on-one and small group contact. The coaches' jobs are to observe your work and to make suggestions on how you might do better, to ask you questions and answer your questions, to challenge you to do a better job, and to recognize your effort when you succeed.

This course is critical for how we do business as an agency, and how we work together as a partnership, in helping our clients address the needs of the resources they manage, and the economic, social, and policy considerations related to those resources.

Instructor Note

You will introduce the State Conservationist for an important statement of support for and commitment to conservation planning. The role of the State Conservationist should be discussed with the State Conservationist at least 2-3 weeks prior to the course. Key points to brief the State Conservationist about are:

1. The State Conservationist should cover:
 - The importance and direction of conservation planning in _____ (state) _____.
 - How this course fits into the needs of _____ (state) _____.
 - Hugh Hammond Bennett's principles of conservation planning.
 - The importance of the conservation partnership.
 - What will be expected of the participants as a result of this course.
 - Recognize those that have made the course possible.
2. Copies of the pre-course reading materials should be provided to the State Conservationist 2-3 weeks prior to the course.

Instructor Note

State Conservationists can develop their own material to cover the points listed above, can utilize the script below, or do a combination of both. Example comments for State Conservationists follows:

Let me now introduce, (name) , our State Conservationist who will share his or her perspectives on conservation planning and the importance of this course. (name) , we are looking forward to your comments.

State Conservationist's Comments:

Welcome—How We Will do Business

Thank you name . I am pleased to be here. I am pleased that all of us are here. I want each of you to know that I believe that this course is absolutely critical if NRCS and our conservation partners are going to provide the services wanted and needed by our clients in (state) .

Conservation planning and application have undergone many major and minor changes over the last sixty years. Since the dust bowl in the thirties, we have been part of a historical conservation movement unlike any other. For fifty years, conservation districts and NRCS have worked hand-in-glove to implement a voluntary conservation program that dealt with agricultural conservation mostly on a first-come, first-serve basis. In 1985 Congress created a farm bill that focused our efforts on reducing soil erosion on highly erodible land. The reduction of soil erosion in the decade that followed was phenomenal.

The 1996 Farm Bill, called the Federal Agricultural Improvement and Reform Act, created another opportunity. This legislation called on the conservation partnership (National Association of Conservation Districts, National Association of State Conservation Agencies, and NRCS) to deal with all the natural resources in a conservation district and to involve agricultural and non-agricultural residents of our communities to help set resource priorities that guide our efforts. Some of our conservation districts have routinely enlisted a variety of community groups to help set priorities, but many others have not dealt with a wide assortment of community interests.

As a sequel to this priority setting task, conservation districts provide local input into programs such as the Conservation Reserve Program, the Environmental Quality Incentives Program, and the Wetland Reserve Program. Emphasis is on the word — local. Providing input into these programs means that conservation districts have new roles and responsibilities. These roles are more far-reaching than the district's previous roles. This farm bill has propelled institutional change in the conservation partnership.

Each of you brings valuable technical knowledge to this course. It is the application of your technical knowledge that allows our clients to sustain the productive use of the natural resources that occur on their properties. Conservation planning is how we deliver your technical knowledge to our clients. Conservation planning is how we help our clients address the social, economic, and policy issues that influence their land use and management decisions. Conservation planning is how we identify whether programs such as the Environmental Quality Incentives Program (EQIP) or the Conservation Reserve Program can help a landowner address resource problems and opportunities. Conservation planning is, therefore, the foundation of the work we do in (state)_____.

Why the Course is Important

This course will bring us up to speed on the latest procedures, techniques, and tools for planning with our clients. While there will be new information presented, the content can be summarized in the five principles of conservation planning listed by Hugh Hammond Bennett in 1947:

- The conservation planner should consider the needs and capabilities of each acre within the plan.
- The conservation planner should consider the client's capabilities, knowledge, facilities, machinery, and economic situation.
- The conservation planner should understand the client's willingness to try new practices.
- The conservation planner should consider the relationship of the land being planned to the entire farm, ranch, community, and watershed.
- Conservation planning should be done in the field with the decisionmaker.

Following these principles will allow us to produce higher quality plans that meet the client's needs. This course puts some meat on the outline provided by Bennett.

Instructors

The course is being taught by members of our NRCS staff and conservation partnership who have experience in conservation planning. These experienced people will be instructors and coaches for those of you with less experience. We are fortunate to have people with extensive experience to help us expand our knowledge and our conservation planning effort.

Now, let me say thanks to you instructors who have given your time to plan and teach this course. I know it is a lot of work. I trust it will be a rewarding experience.

I also want to thank those of you who have agreed to serve as coaches. Your work to make this course a success will last for several months after the classroom and field exercise portions of the course have ended. You are special teachers for our less experienced staff.

State Partnerships

I am glad that there are representatives from the state's conservation partnership participating in this course. From my perspective this course is available not only for NRCS staff, but for all members of our partnership.

The job of conservation planning is vast and complex. No longer can one agency “do it all” or “go it alone.” Partnerships are critical for getting the job done.

It is important for all of us to understand that it is the partnership that makes our work possible. NRCS would not be in state if there was not a state law that invited us to be here. The partnership would not be providing assistance to land owners if the Conservation Districts did not exist. And the local and state partners—and our clients—would not have the same level of staff and the technical expertise available if NRCS was not present in the state. The conservation partnership helps us set priorities and focus our resources on those issues of most importance

to the people of state. Also, areawide conservation plans and assessments sponsored by members of the partnership help us deliver services that meet the needs of individual clients and the communities where clients live and work. Together we form a workable system that can help non-federal land owners conserve and enhance the resource base that is so important to this Nation and the world. It is important that we are here together to learn how to do our jobs better.

Thank the Landowners

I want to say a special thanks to the name and name families, who are allowing us to use their farms for the course field exercises. These are generous contributions on the part of the name and name families. As we do the field exercise, let us be appreciative of this contribution and respectful of their property.

Expectations

At the conclusion of this course, including a supervised work assignment following this formal portion of the course, the expectation is that each of you will be able to work at a proficiency level of “4—can perform independently unless special problems are encountered.”

At this level of proficiency you should be comfortable in responding to a client’s request for help—or initiating the contact yourself. You should be prepared to help the client work through the 9 steps of our conservation planning process. At this level of proficiency you should be able to help a landowner use programs such as EQIP or CRP to implement a comprehensive conservation plan.

State leadership is involved in workload assessment and assignments that should allow each of you to focus more of your time on comprehensive conservation planning. Clients are serious about wanting help. We are serious about the importance of conservation planning. We expect you to be active participants in this course.

Summary

In summary, conservation planning—in the field with the client—is how we deliver our technical knowledge. The policy, guidelines, and procedures laid out for NRCS in the General Manual and the National Planning Procedures Handbook spell out the way we will do business. That's why this course is so important and why your active participation is so critical.

I challenge each of you to take full advantage of the materials and instruction covered in this course, as well as the opportunity to share and network as the course progresses.

Thank you in advance for your effort and commitment. Are there any questions or comments?

Instructor Note

Help the State Conservationist moderate the question and answer period. Express thanks to the State Conservationist for speaking. You should then take a break. If the State Conservationist is going to leave, then the break should be 15-30 minutes so more people can visit. If the State Conservationist plans to stay so people can visit later, the break could be 10 minutes.

Thank you name for those comments. You have certainly helped us get started with a vision of what we need to accomplish. I know that we are up to the task.

I am sure that some of you would like to visit one-on-one with the State Conservationist so we are going to take a break here so you can do that. Be back here at time.

Self-Introductions

Welcome back.

Let's take some time for self-introductions. I'll start that process by sharing with you (1) who I am (name), (2) my background (positions, locations, experience in conservation planning), (3) my hobbies, (4) something unique about myself, and (5) my expectations concerning this course.

Instructor Note

Have these five items written on one of the flip charts and display them at this time.

Then I would like each of you to do the same. As you share your expectations for the course, we'll capture them on the flip chart.

Instructor Note

At the end of the introductions you will use some of the participants' expectations to generate discussion. As expectations are listed, identify in your mind those that you believe can be used for discussion.

Following is an example introduction. You should develop an introduction for yourself.

Example:

My name is _____. I am a native of ____ (state) ____, and was raised on a small grain and dairy farm in the central part of that state.

My career in NRCS began as a student trainee in XYZ (state) in 1975, followed by positions as soil conservationist and District Conservationist, also in XYZ. I have also served in _____, _____, and _____ positions in ____ (state) ____ and ____ (state) ____.

Most of my experience in conservation planning occurred while I was a soil conservationist and a District Conservationist. As a conservation planner, I helped farmers and ranchers in XYZ develop what were at the time comprehensive plans, as well as helping them plan and install conservation practices that were cost shared. The most complex conservation planning work I did was in developing plans that later became Great Plains Conservation Program Contracts. Working with a client to develop a comprehensive plan is challenging and rewarding. I hope we can get back to doing more of that kind of planning.

My hobbies include photography, outdoor activities, movies, and eating out. The hobby I enjoy most is photography. In addition to taking pictures I also develop my own film and do enlargements, both in black and white, and color.

Something unique about myself is that _____.

My expectation for this course is that it will help us become more proficient in working with our clients in helping them develop and implement conservation plans.

Individual Introductions

Okay, let's go around the room and let each of you take a couple of minutes to tell a little bit about yourselves. I would also like our instructors and guests to participate in sharing information about themselves as well. Instructors, since I did not take the time to introduce you, please indicate in your introduction what parts of the course you will be teaching.

Instructor Note

You will call on the first person and keep the process going. A second instructor can write the expectations on a flip chart.

Wrap-up to the Introductions

Thanks for taking the time to introduce yourselves. That helped get us off to an excellent start and sets the stage for further discussions during the course.

Review of Participant Expectations

You folks identified some very important expectations for the course. For example _____, _____, _____, and _____. Let's take a moment to talk about these.

Instructor Note

Lead the group through a brief discussion of a few of the expectations. You might ask the person suggesting an expectation to elaborate on their point. (The purpose of this discussion is to get the group talking.) End with a statement such as—

I feel even more strongly about this course and the impact it will have on the way we provide conservation planning assistance to our clients.

Instructor Note

The following section explains to participants the approach to learning that will be followed in the course. You should develop this section of your presentation to reflect decisions made in the state about how the course is to be taught. Including a “road map” of the course is important so that participants will always know where they are in the course and why each part is important. You should answer most questions when they come up. You may want to put some questions in the “parking lot” because you know they will be answered later in the discussion.

Overview of the Course

Welcome back

Before we review the organization of the course, allow me to draw your attention to the pre-course reading materials on “How NRCS Will Do Business.” These are in your notebook. If you have not already done so, please read these tonight. Many of the objectives for Module 1 are going to be accomplished through your reading of these materials.

Now, let's take time to overview the course. The purpose of this course is to prepare the participant—you—to be more proficient in using the NRCS planning process, to assist clients in making decisions resulting in quality conservation plans that protect, conserve, and enhance the natural resources and meet the client's needs.

The minimum proficiency level expected at the end of the course is “4, apply independently - can perform independently unless special problems are encountered.”

Please turn in your notebook to the layout of the course.

NRCS Conservation Planning Course Layout

Course Content

Method of Delivery

Time Required

Part I - Background and Framework

Classroom or
Computerized

One Week
or Self-Paced

1. How NRCS Will Do Business
2. Planning Policy and Guidance
3. Key Elements of Conservation Planning
4. Conservation Planning Environment
5. Resource Management Systems

Part 2 - Hands-On Application

Classroom & Field Exercises

One Week

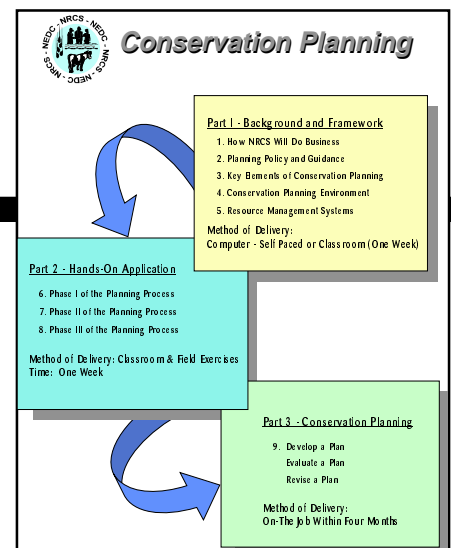
6. Phase I of the Planning Process
7. Phase II of the Planning Process
8. Phase III of the Planning Process

Part 3 - Conservation Planning

On-The-Job

Within Four Months

9. Develop a Plan
- Evaluate a Plan
- Revise a Plan



Overhead #1-1

Part 1—Background and Framework

This course is divided into three parts. Part 1 is designed to provide you the background and framework for conservation planning. Included in this part are modules that cover:

Module 1—How NRCS Will Do Business

Module 2—Planning Policy and Guidance

Module 3—Key Elements of Conservation Planning

Module 4—Conservation Planning Environment

Module 5—Resource Management Systems

Module 1—How NRCS Will do Business. Module 1 sets the stage for the course, provides a synopsis of the history of NRCS and the Conservation partnership, and describes how we will do business in the conservation planning arena.

Module 2—Planning Policy and Guidance. This module provides highlights of conservation planning and related policy, as well as a discussion of programs and how they relate to the process.

Module 3—Key Elements of Conservation planning. This module covers the key elements of conservation planning (planner, client, process, plan, and partnership) and an introduction to the three-phase, nine-step planning process.

Module 4—Effective Planning Environment. Module 4 covers a discussion of the effective planning environment, including the components and relationships of the natural resources, cultural resources, economic considerations, social considerations, and policy issues.

Module 5—Resource Management Systems. In this module, you will learn about our Resource Management System (RMS) planning tools. It is important that we do this before we go to the field to help a client develop a plan. To do this we will use data from a hypothetical farm situation developed for this course. This module will prepare us to be more effective and efficient in our field work.

Part 2—Hands on Application

The second part of the course—this week—involves classroom and field work to help you learn and apply the 9-step conservation planning process. This part of the course includes:

Module 6—Phase I of the Planning Process. In this module you will complete steps 1 through 4 of the conservation planning process. This includes the client and conservationist (1) identifying resource problems or opportunities, (2) setting goals and objectives, (3) inventorying resources, and (4) analyzing resource data. In this module you will meet name , who is allowing us to use his farm for our field exercise. I know we all look forward to being in the field with this land owner. name will talk about problems, some opportunities, and objectives for the farm. It will be our job to get additional information through questions. Once we understand name problems, opportunities, and objectives, we will go to work conducting the necessary inventories and analyzing the data we collect. Our course instructors will role play the client, so you can consult someone about the property at any time. Please be aware that you will work in teams to accomplish the work called for in this module. We will talk later about these teams and how they will work.

Module 7—Phase II of the Planning Process. In this module you will use the conservation planning tools learned in Module 5, and the information about name's farm that you gained in Phase I of the planning process to develop and evaluate alternative RMSs for name's farm. These are steps 5 and 6 of the conservation planning process. You should return to the farm as necessary to gather additional information.

Phase II of the planning process includes step 7 of the planning process— working with the client to reach decisions about what resource management system will be implemented. After you have developed appropriate RMSs, you will work with the NRCS staff member designated to play the role of the client to reach decisions about which RMSs best protect the resources and meet the client's objectives.

At this point in the class each of the groups will have completed a plan for name's farm. This plan will meet the quality criteria outlined for a conservation plan in the National Planning Procedures Handbook.

Module 8—Phase III of the Planning Process. This phase includes planning steps 8 and 9—implementation and evaluation. To learn how to evaluate a conservation plan, you will be working with your group on name's farm. A comprehensive conservation plan was developed on this farm by the client with assistance from NRCS in year. You will determine what progress has been made in implementing the existing conservation plan and evaluate whether the plan is still meeting the client's needs. You will review what the client has done to implement the planned RMS and determine how we can assist name to install the next parts of the system. You will review the current plan with name. You work with the staff member role playing the client to determine if changes are needed. Based on the client's decisions, you will do the necessary work to complete the evaluation process.

Questions?

Before I continue, are there any questions?

Part 3—The Coaching Arrangement and Conservation Planning Assignment

Coaching

I suspect each of you wondered about the post-course assignments and the “coaching” setup when you read the information material describing the course. Allow me to elaborate now. We have paired those of you with less experience with an experienced conservation planner. This individual will serve as your "coach".

Coaches are:

- to answer questions
- to ask questions
- to encourage participation in class
- to challenge you to do the best job possible
- to recognize you for your effort

This approach might be called “supervised work experience.” It represents the ultimate in training "one-on-one" and, should become the way we develop human resources.

Post-Course

Some of the coaches are here as instructors, group leaders, or participants in this course. Some coaches that have already completed this or similar courses are not here. Those of you assigned to a coach that is not here should make contact and schedule a meeting with that individual soon after this course ends. Within four months of the end of the course each team of coach and participant is to repeat the primary learning exercises conducted in this course:

1. Develop a conservation plan with a land owner,
2. Work with a land owner to review implementation and determine the status of an existing plan, and
3. Revise an existing conservation plan.

The result of this work will be the official, up-to-date plans that the District and NRCS will have with the clients. The plans will have to pass the scrutiny of the clients and supervisors as well as the coaches.

Lead Planner

Those of you with less experience in conservation planning will be the lead planner. Those with more experience—the coaches—will guide and help as needed. Lead planners should apply fairly independently what has been learned in this course. You should initiate contact with the clients and set schedules to make steady progress in completing the plans.

You should call upon your coach to review and critique your work as you progress through the planning process. Do not wait until you have a completed plan to call on your coach for guidance. Call on your coach to assist with any part of the planning process that you are a bit nervous about. This can range from inexperience in meeting with clients to discuss problems, opportunities, and objectives; to lack of knowledge in a certain inventory technique; to lack of experience in guiding a client through the analysis of alternative Resource Management Systems to a decision.

Do not call on the coach at the last minute. Remember that each coach has duties and responsibilities in addition to serving as your coach. Help them work you into their schedule.

Assistance From Coaches

We have told the coaches that they must find a way to be available. This does not mean that coaches should drop everything when the person they are helping calls. In fact, coaches should probably respond to a call for “emergency help right now,” with advice that the staff member let time bring some perspective to the emergency, unless the coach agrees that there is a true emergency.

Coaches should let the staff member they are assisting schedule the work, but should not hesitate to comment when they think the proposed schedule is too optimistic or too prolonged. Coaches should agree that the final plans are workable and meet the standards of NRCS before they are reviewed by the staff member's direct supervisor and presented to the clients.

The coaches should visit in private with the clients and get their view of the staff member's technical knowledge and interpersonal skill, and then share in private what they learn from the client with the staff member. This consultation is not part of performance evaluation. It is a way for us to engage the client in evaluating the quality of the services we provide.

Questions?

Does anyone have any questions?

Pre-course Test

Instructor Note

You will administer the course pre-test. It should take about _____ minutes. After participants have completed the pre-test, set up the room for the next session.

As a way of gauging where we are as a class at the beginning of the course, and as a way of starting the thought process, we do have a pre-course test that we want you to take. At the end of the course we'll have another short test to measure the impact of the course.

At the end of the test, you can turn your test in to me and take a short break. We'll reconvene our class at ____ (time) ____.

We have a challenging few days ahead of us. Again, a hearty welcome to each of you. You are in for an exciting time of learning and sharing as this course unfolds.